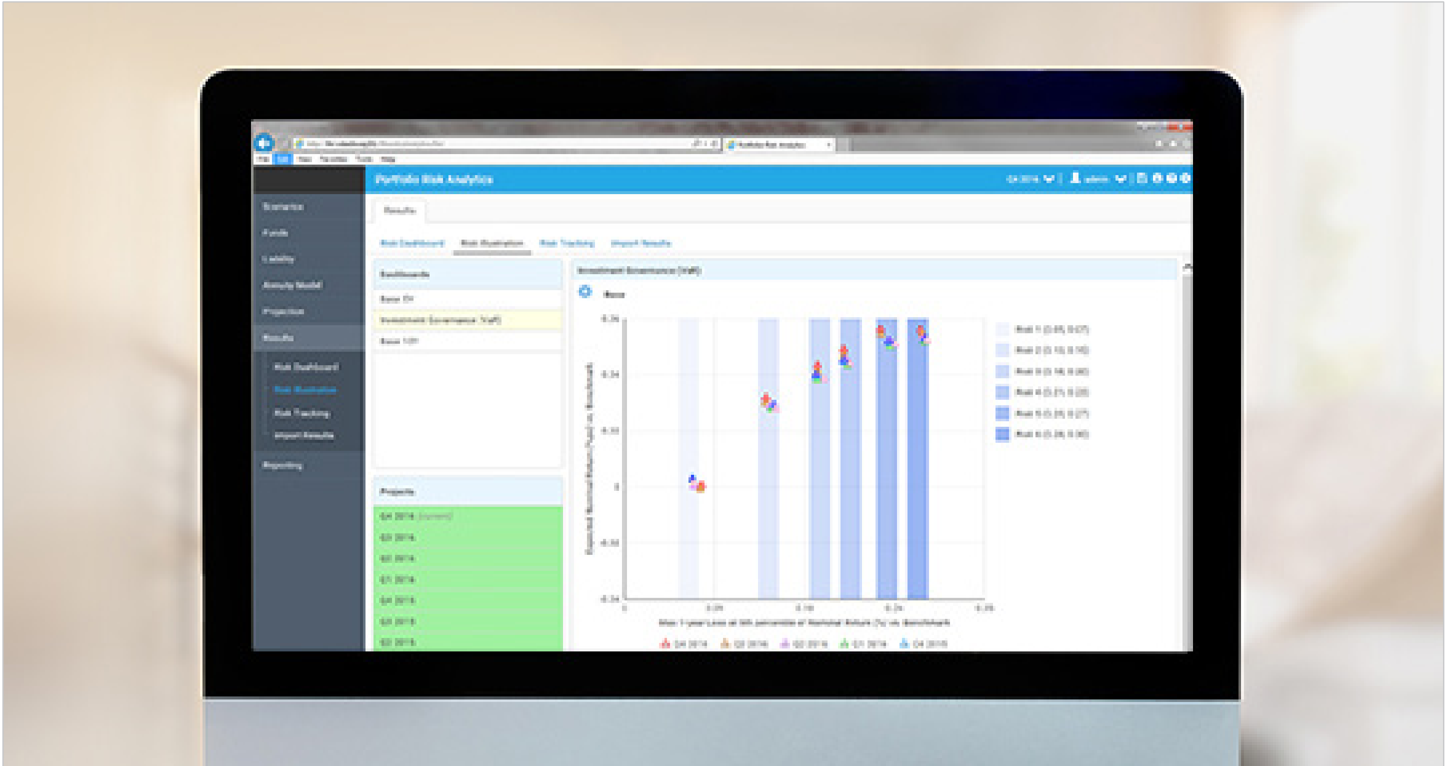
Moody's Analytics

Portfolio Risk Analytics



Portfolio Risk Analytics allows wealth managers, advisers and retail product providers to create forward-looking risk analyses for multi-asset investment portfolios. Developed to support a wide range of business applications, Portfolio Risk Analytics is a flexible cloud-based financial projection solution hosted by Microsoft Azure, and powered by Moody's Analytics award winning economic scenario modeling.

Leverage award-winning modeling to create powerful analytics

» Build customized investment solutions reflecting savings scenarios and cash flows for retail investors, including wealth accumulation, retirement saving, and retirement income withdrawal.

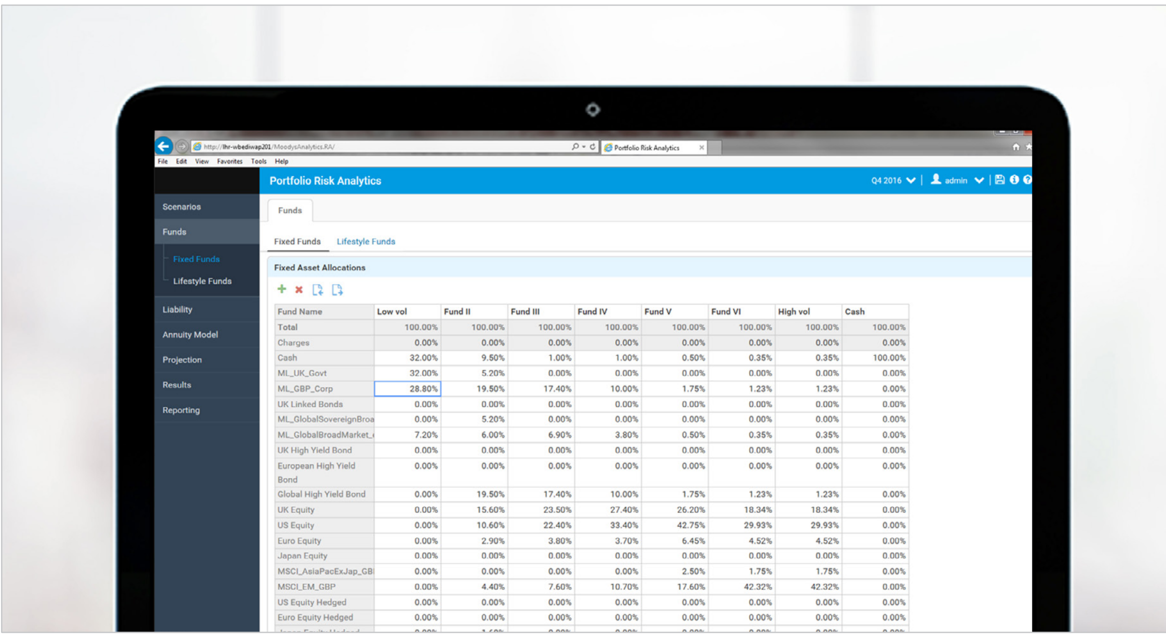
» Access the latest economic scenario data and content on a quarterly cycle, via your Portfolio Risk Analytics account.

» Configure asset allocations for fixed, life-styled or target date investment funds to test alternative fund strategies, tactical asset allocations, or the effect of switching asset classes.

» Select from a wide range of quantitative risk metrics to calculate and communicate risk in terms that are meaningful to clients and reflect investment objectives.

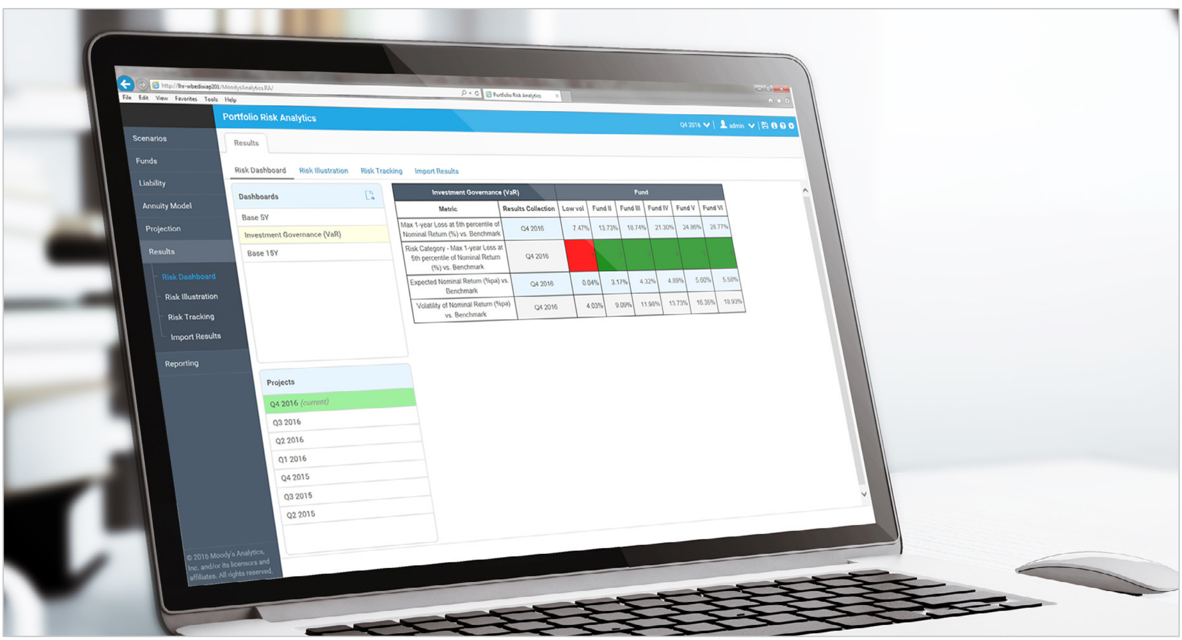
» Browse prepared content and analyses through your web browser, download tailored PDF reports, or create new projects to carry out bespoke analyses.

» Access a secure cloud-based service hosted by Moody's Analytics on Microsoft Azure, with no IT footprint or requirement to install software.



Input fixed and life-styled strategic asset allocations

Track movements in risk metrics that affect portfolios over time



Access prepared content or produce custom dashboards of results

Supports multiple business applications

» Design and implement a robust risk management framework to support the governance of retail investment propositions based on appropriate measures of risk and performance.

» Risk grade third-party funds, portfolios, or existing investment solutions using objectively and quantitatively defined risk categories.

- Design new investment solutions for savings, retirement accumulation, or retirement drawdown. Test alternative asset allocations, stress investment objectives cash flows, and benchmark against competitor products.
- Demonstrate and communicate the suitability of investment solutions for defined contribution schemes taking into account demographics, contribution rates, and more.
- Perform bespoke project work evaluating defined benefit to defined contribution transfers, and the impact of changing default funds.

Robust Risk Management

Portfolio Risk Analytics provides the capability for firms to create flexible and sophisticated risk analyses to support the design and governance of their investment propositions, assess suitability of investment solutions in relation to defined savings objectives, or enhance customer communications. The application leverages Moody's Analytics award-winning economic scenario generator models to provide an objective assessment of financial risk in investment portfolios. Its outputs are based on measures of risk and performance that are meaningful and understandable to retail investors, and reflect realistic investment goals.

CONTACT US

Find out more information about Moody's Analytics award winning products and solutions.

www.moodysanalytics.com/contact-us

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